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ABSTRACT

Supporting performance objective 68 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on answering the telephone are included in this packet. (The packet is the first in a set of four on performing receptionist activities--CE 016 936-938.) The student materials include a review of a filmstrip presentation and answer key, information and activity for putting a call on hold, activity for taking the recording a message (for which there is an answer key), activity for telephone conversations, a review test, and an instructor's final checklist. The instructor's manual includes directions and suggestions for administering the packet, a list of materials and equipment needed, simulated forms for duplicating, student activity key, answers to review test, and the narration for the filmstrip. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the four packets in this set along with those in several other sets--seventy-eight packets in all-based on the same V-TECS catalog.) (JT)

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PERFORMING RECEPTIONIST ACTIVITIES
ANSWER THE TELEPHONE

STUDENT'S MANUAL

Prepared by

Pam Harrison

These materials support
Performance Objective 68 of the
V-TECS Secretarial Catalog

State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201

In Cooperation With

Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631

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ANSWER THE TELEPHONE

INTRODUCTION

Have you ever thought about how important good social telephone personality is to your business career? Consider this fact! Approximately 90% of business transactions are conducted by telephone. Good telephone techniques demand "personality plus" tone. Your voice tells the caller that you're genuinely interested, alert, friendly, and helpful. A favorable telephone impression leaves the caller with a comfortable understanding of you as well as your company. In this module you'll learn to be "personality plus" when answering calls.

ENTERING BEHAVIOR

The student should be able to operate a filmstrip projector and cassette tape recorder. If the student feels capable of completing the objectives listed below without performing the learning activities, the student may arrange with the teacher to complete the final activity at the end of the module. This activity should be rated by the teacher.

OBJECTIVES

1. Given a situation with an incoming telephone call, the student will be able to create a favorable impression of the company using proper techniques.
2. Given an incoming call situation, the student will record the message accurately and properly.
3. Given an incoming telephone situation, the student will be able to end the conversation courteously and tactfully.

TURN THE PAGE AND COMPLETE LEARNING ACTIVITY 1.

COMMUNICATIONS

LEARNING ACTIVITIES

1 READ (Selected section from Business English or secretarial procedures book)

2 VIEW filmstrip presentation. Obtain filmstrip, cassette tape, recorder, and projector from your teacher. FOCUS PROJECTOR ON FRAME ONE (1).

3 READ Study Sheet I, Review of Filmstrip Presentation.

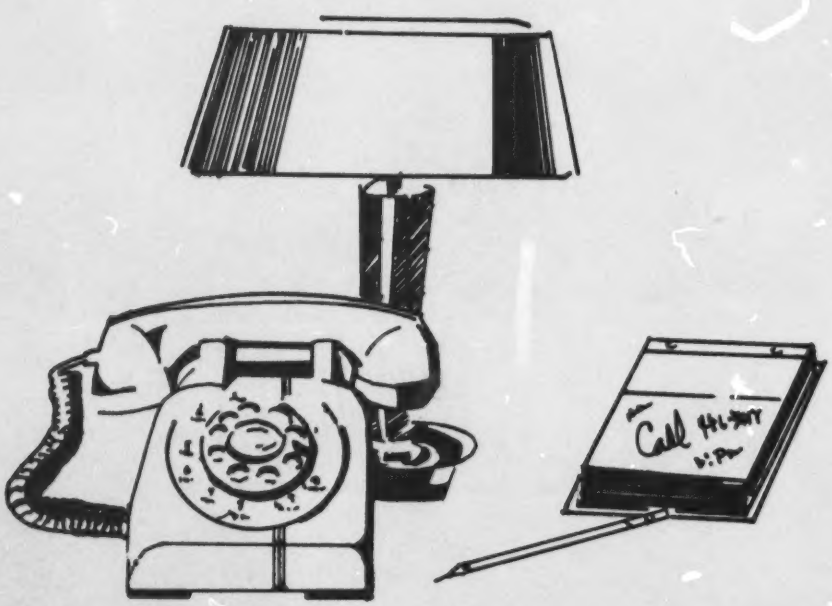
4 READ Student Activity Sheet II, Putting the Caller on Hold.

5 COMPLETE Student Activity Sheet III, Taking and Recording a Message.

6 COMPLETE Student Activity Sheet IV, Telephone Conversations.

7 COMPLETE Student Review (to be rated by teacher using teacher checklist).

PERFORM THE ACTIVITIES LISTED ABOVE IN THE ORDER IN WHICH THEY APPEAR.



STUDY SHEET I

REVIEW OF FILMSTRIP PRESENTATION

ANSWER THE FOLLOWING QUESTIONS ON A SEPARATE SHEET OF PAPER

1. How do you create a favorable impression over the telephone?
   a.
   b.

2. Courtesy is the most important part of all telephone conversations. List four suggestions for telephone courtesy.
   a.
   b.
   c.
   d.

3. When messages are taken be sure to include five steps. List five.
   a.
   b.
   c.
   d.
   e.

4. Choose the best answer:
   When one of the buttons on the telephone is blinking, it means
   a. the line is in use
   b. the line is available for use
   c. the line is on hold
   d. the line is being used for interoffice conversation

5. After ending the conversation promptly and tactfully, what should you always say to the caller?

6. If your boss is gone for the day, what do you do with all the messages you've taken?

7. After ending the call, you should do what?

8. When should you be cautious in a conversation?

9. When someone is on "hold" for longer than 30 seconds what should you do?

10. Before you connect your boss with a caller what do you do?

CHECK YOUR ANSWERS ON THE FOLLOWING PAGE - - -

ANSWERS TO REVIEW OF FILMSTRIP PRESENTATION

1. a. Answer the telephone promptly.
   b. Give proper identification.

2. a. Speak clearly and distinctly into the receiver.
   b. Be friendly and pleasant to all callers.
   c. Be enthusiastic and alert to caller's questions and requests.
   d. Talk naturally and sincerely.

3. a. caller's name
   b. telephone number
   c. time of call
   d. message
   e. initials

4. c

5. "Thank You"

6. Place them on the boss' desk.

7. Get back to work.

8. Be cautious when confidential or business questions arise.

9. Give the caller a progress check.

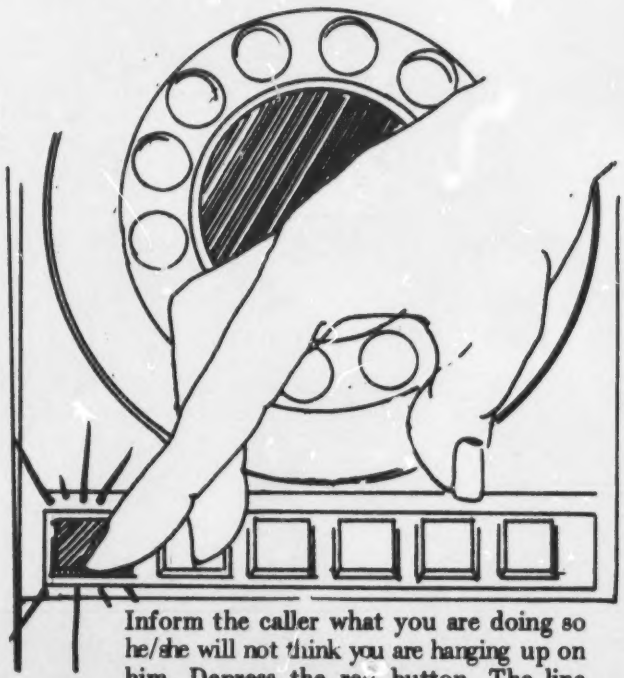
10. Ask the caller's name and tell your boss before connecting the two parties.

STUDENT ACTIVITY SHEET II

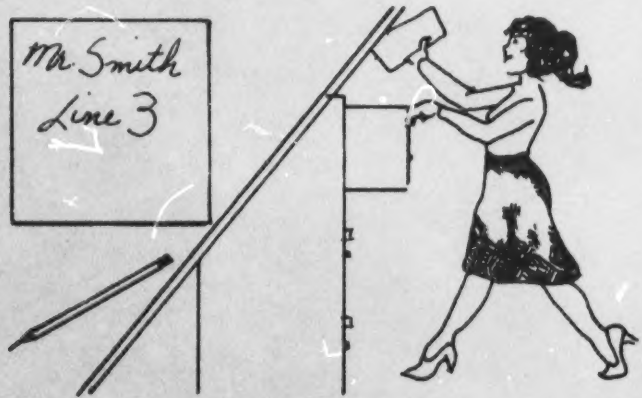
PUTTING THE CALLER ON HOLD

Read the following instructions explaining how to put a caller on hold.

1. Find the hold button. It is the red button at the bottom left of the telephone.



2. Inform the caller what you are doing so he/she will not think you are hanging up on him. Depress the red button. The line will begin to blink, informing others that the line is on hold.



3. A. Write on a pad the line you put on hold and also the caller's name. This is important in case you return to talk to your caller and two lines are blinking.

   B. While the caller is on hold, find the information he is seeking. Try to find this information as quickly as possible so you will not keep the caller waiting.

4. After returning to the telephone, pick up the receiver, depress the proper line button, and begin talking to the caller.

STUDENT ACTIVITY SHEET III

TAKING AND RECORDING THE MESSAGE

STUDY THE MESSAGE BLANK BELOW

TO _____

TIME _____ DATE _____

M _____

OF _____

TELEPHONE NO. _____

TELEPHONED	☐	PLEASE CALL	☐
WILL CALL AGAIN	☐	URGENT	☐
RETURNED CALL	☐	CALLED TO SEE YOU	☐

MESSAGE _____

_____

SIGNED _____

Be sure when you are taking a message that you get the message right. Do not hesitate to ask the caller to spell his/her name or to repeat the telephone number or message.

The following case situations are for practice in taking messages. Obtain forms from your teacher or make your own using the form above as an illustration.

SITUATION: You are secretary-receptionist for Ms. Salley Carlton, an attorney. The following are calls that come in while Ms. Carlton is in a meeting.

1. Mr. Jack Smithe of 794-3274 called to cancel his appointment for April 4 at 3:30 p.m. He will call again to reschedule.
2. Mr. Stuart Jones called; however, he would not leave his number. He will call later. He sounded urgent.
3. Mrs. Frances Stewart called from the court house-432-9673, Ext. 76. She needs Mr. Albert Smart's file by 3:15 p.m.
4. Mr. Robby Jones of Hent International 743-6747 called. I scheduled an appointment for Wednesday at 10:15 a.m.

CONTINUE TO THE NEXT PAGE AND CHECK YOUR ANSWERS.

ANSWERS TO STUDENT ACTIVITY III

TO Ms. Carlton
TIME current DATE current
Mr. Jack Smithe
OF –
TELEPHONE NO. 794-3274

TELEPHONED	✓	PLEASE CALL	
WILL CALL AGAIN	✓	URGENT	
RETURNED CALL		CALLED TO SEE YOU	

MESSAGE Cancelled appt for 4/14. Will reschedule
SIGNED your name

TO Ms. Carlton
TIME current DATE current
Mr. Stuart Jones
OF –
TELEPHONE NO. wouldn't say

TELEPHONED		PLEASE CALL	
WILL CALL AGAIN	✓	URGENT	✓
RETURNED CALL		CALLED TO SEE YOU	

MESSAGE sounded important
SIGNED your name

TO Ms. Carlton
TIME current DATE current
Mrs. Frances Stewart
OF Courthouse
TELEPHONE NO. 432-9673 Ext. 76

TELEPHONED	✓	PLEASE CALL	
WILL CALL AGAIN		URGENT	
RETURNED CALL		CALLED TO SEE YOU	

MESSAGE Needs Al Smart's file by 3:15 p.m.
SIGNED your name

TO Ms. Carlton
TIME current DATE current
Mr. Robby Jones
OF Dent Intdl
TELEPHONE NO. 743-6747

TELEPHONED	✓	PLEASE CALL	
WILL CALL AGAIN		URGENT	
RETURNED CALL		CALLED TO SEE YOU	

MESSAGE Scheduled appt. for Wed. at 10:15 a.m.
SIGNED your name

STUDENT ACTIVITY SHEET IV

TELEPHONE CONVERSATIONS

DIRECTIONS: Using the correct telephone procedure learned in this module, write (on separate sheet of paper) the telephone conversation that might take place under the following situations. The first one is done for you as an example.

When you have finished, let your teacher check your paper for correctness.

SITUATION: You are working for Good Fit Jeans, Inc. Your boss is Mr. Allen Ford, Traffic Manager. Mr. Ford is out of the office for the day. The following are calls that come in while you are in charge.

1. Ms. Anne Jones of Sandy's Department Store calls to cancel her shipment.

CONVERSATION:

Telephone Rings.

YOU: Good morning! Mr. Ford's office_____ speaking.

CALLER: This is Anne Jones of Sandy's Department Store. May I speak with Mr. Ford?

YOU: I am sorry, but Mr. Ford is out of the office for the day. May I help you?

CALLER: Mr. Ford was to mail our shipment of jeans on May 6. We need to find out if it is too late to cancel our order.

YOU: I'm sorry, Ms. Jones, but I will have to have Mr. Ford call you back on this matter. If you will leave your telephone number, I will have him call you first thing tomorrow morning.

CALLER: Yes, my number is 333-6999, extension 44. Thank you ____. Good-bye.

YOU: Good-bye.

Two (2) more calls are given below. Write the appropriate telephone conversation for each situation on a separate sheet of paper.

1. Mr. John Warren calls Mr. Ford to ask information on how long it would take to ship his order to Dallas.

2. The president of the company, Mr. Stuart, calls and wants you to have Mr. Ford call him first thing in the morning. It is urgent. His extension is 59.

GIVE THESE TO YOUR TEACHER FOR CHECKING.

POOR COMMUNICATIONS ARE
REALLY HURTING OUR BUSINESS!
WE'VE EVEN LOST CUSTOMERS.

MAYBE YOUR SECRETARY
NEEDS TO BRUSH UP ON
HER TELEPHONE
TECHNIQUES!

Will your employer say this about YOU?

STUDENT REVIEW TEST

DIRECTIONS: This test should be completed in the presence of your teacher. Your teacher will use a rating sheet to grade you. Answer each question on a separate sheet of paper.

1. Explain how you put a caller on hold.

   a.
   b.
   c.
   d.
   e.

2. In the situation given, answer the telephone supplying the appropriate responses. You may want to arrange for another student to play the part of the caller.

   SITUATION: You are the secretary to Mr. Peter Lord, Personnel Manager. The following is an incoming telephone call. Make the appropriate responses. This should be done orally.

   Telephone rings

   You:

   Caller: Hello, this is Anne Thorne. I have an interview with Mr. Lord this Friday at 3:15. I have to go out-of-town unexpectedly. Is there any way I can change this appointment?

   YOU:

   Caller: That will be fine. Is there anything I need to bring when I come?

   YOU:

   Caller: Thank you for helping, goodbye.

   YOU:

3. Take the message for the following call. Obtain the forms from your teacher. Mr. Lord is out of the office when Mr. Andrews calls. Mr. Andrews needs Joe Brown's records by 3:30. His extension is 479.

CHECK WITH YOUR INSTRUCTOR FOR ANSWERS.

LAP

Student _____ _____

Date _____

PERFORMING RECEPTIONIST ACTIVITIES
ANSWER THE TELEPHONE

Instructor's Final Checklist

Check the student's performance in the following elements of answering the telephone.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

The student:

	Student Performance			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1. Answered promptly and pleasantly	[ ]	[ ]	[ ]	[ ]
2. Gave proper identification	[ ]	[ ]	[ ]	[ ]
3. Was attentive	[ ]	[ ]	[ ]	[ ]
4. Was of assistance to caller	[ ]	[ ]	[ ]	[ ]
5. Volunteered helpful information	[ ]	[ ]	[ ]	[ ]
6. Explained information effectively	[ ]	[ ]	[ ]	[ ]
7. Was prepared to take message	[ ]	[ ]	[ ]	[ ]
8. Recorded necessary information	[ ]	[ ]	[ ]	[ ]
9. Verified information	[ ]	[ ]	[ ]	[ ]
10. Used proper technique in putting caller on hold	[ ]	[ ]	[ ]	[ ]
11. Distributed messages	[ ]	[ ]	[ ]	[ ]
12. Created a pleasing impression	[ ]	[ ]	[ ]	[ ]
13. Made sure call was over before hanging up	[ ]	[ ]	[ ]	[ ]
14. Used correct grammar	[ ]	[ ]	[ ]	[ ]
16. Avoided slang	[ ]	[ ]	[ ]	[ ]
17. Used friendly, sincere manner	[ ]	[ ]	[ ]	[ ]
18. Represented the company courteously and confidently	[ ]	[ ]	[ ]	[ ]

PERFORMING RECEPTIONIST ACTIVITIES
ANSWER THE TELEPHONE

INSTRUCTOR'S MANUAL

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TO THE TEACHER

This module is designed to be used individually or by the entire class. Please review carefully before beginning instruction.

Perishable items that you will need to duplicate include:

1. Telephone message forms, page 15 – 4 per student for Student Activity III and 1 per student for Student Review Test, Problem 3.

2. Instructor's Final Checklist, page 12 – 1 per student for your evaluation of each student.

Student Activity Sheet IV and the Student Review Test are to be graded by you. The student has been instructed to turn the activity in to you as soon as it is completed.

Keys to Student Activity IV and the Student Review Test are given in your manual. Also a narration for the filmstrip is included for your use in recording the cassette.

MATERIALS NEEDED

filmstrip projector
cassette tape recorder
telephone message forms
pad
pencil
paper
telephone (optional)

TIME

This module should take one class period to two class periods to complete depending on the student taking it.

COMMENTS

As a quest activity the student could arrange to work in the school office or an office outside of school answering the telephone. You may obtain a Teletrainer from your local telephone company.

TO _____

TIME _____ DATE _____

M _____

OF _____

TELEPHONE NO. _____

TELEPHONED	☐	PLEASE CALL	☐
WILL CALL AGAIN	☐	URGENT	☐
RETURNED CALL	☐	CALLED TO SEE YOU	☐

MESSAGE _____

SIGNED _____

TO _____

TIME _____ DATE _____

M _____

OF _____

TELEPHONE NO. _____

TELEPHONED	☐	PLEASE CALL	☐
WILL CALL AGAIN	☐	URGENT	☐
RETURNED CALL	☐	CALLED TO SEE YOU	☐

MESSAGE _____

SIGNED _____

TO _____

TIME _____ DATE _____

M _____

OF _____

TELEPHONE NO. _____

TELEPHONED	☐	PLEASE CALL	☐
WILL CALL AGAIN	☐	URGENT	☐
RETURNED CALL	☐	CALLED TO SEE YOU	☐

MESSAGE _____

SIGNED _____

TO _____

TIME _____ DATE _____

M _____

OF _____

TELEPHONE NO. _____

TELEPHONED	☐	PLEASE CALL	☐
WILL CALL AGAIN	☐	URGENT	☐
RETURNED CALL	☐	CALLED TO SEE YOU	☐

MESSAGE _____

SIGNED _____

KEY
STUDENT ACTIVITY IV

Conversation:

1. Telephone rings

You: Good morning! Mr. Ford's office. _____ speaking.

Caller: This is John Warren of Warren Construction, Dallas. Is Mr. Ford in?

You: Mr. Ford is out of the office, Mr. Warren. May I be of some help?

Caller: Yes, I need to know how long it will take to ship my recent order No. 5234 to Dallas.

You: Usually on an order of this type, you can expect it one week from the date of shipment. I will have Mr. Ford call you in the morning to confirm this.

Caller: Thank you. My number is 606-225-3678.

You: Goodbye. Thanks for calling, Mr. Warren.

2. Telephone rings

You: Good afternoon. Mr. Ford's office. _____speaking.

Caller: This is Sam Stuart. May I speak to Mr. Ford?

You: Mr. Ford is out of the office today, President Stuart. May I help you?

Caller: Yes, would you please have Mr. Ford call me at extension 59 first thing in the morning. It is urgent.

You: I'll be glad to give Mr. Ford your message and have him call in the morning.

Caller: Thanks. Goodbye.

You: Goodbye.

ANSWERS TO STUDENT REVIEW TEST

1. a. Ask the caller if he or she wishes to wait.
   b. Depress the red "hold" button.
   c. Obtain the necessary information.
   d. Depress the blinking white button when you return.
   e. Thank the caller for waiting.

2. CONVERSATION:

   Telephone Rings:

   YOU: Good morning! Mr. Lord's office, (student's name) speaking.

   CALLER: Hello. This is Anne Thorne. I have an interview with Mr. Lord this Friday at 3:15. I have to go out of town unexpectedly. Is there anyway I can change this appointment?

   YOU: Yes, will Monday, the third at 1:00 be suitable?

   CALLER: That will be fine. Is there anything I need to bring when I come?

   YOU: No, we have all your information on file.

   CALLER: Thank you for helping. Good-bye.

   YOU: Good-bye, Ms. Thorne.

3.

TO Mr. Lord

TIME Current DATE Current

Mr. Andrews

OF

TELEPHONE NO. Ext. 479

TELEPHONED	X	PLEASE CALL	X
WILL CALL AGAIN		URGENT	
RETURNED CALL		CALLED TO SEE YOU	

MESSAGE Needs Joe Brown's records by 3:30.

SIGNED Student's Name

NARRATION FOR FILMSTRIP

ANSWER THE TELEPHONE

Objective 68

1. (Ring, ring) "Good Morning, Smith's Insurance Company, Ann Lawton." (secretary's voice) "So begins Ann's day in the small office." (narrator)

2. "Ann meets many clients for the first time over the phone. It is important to be friendly and natural. Let's listen" (narrator) "Yes I'll try to locate him, Mr. Johnson. Do you care to wait, or shall I have him call you?" (secretary's voice)

3. Ann must take messages when Mr. Smith is out of the office. Here is the form she uses. (narrator)

4. Mr. Johnson has decided to leave a message. Let's listen in... (narrator) "Tell him Jim Johnson called to get a price quotation on car insurance. Have him call me, OK?" (male voice)

5. "Mr. Johnson could you leave me your number so he can call you back promptly?" (secretary's voice)

6. She verifies the message by saying, (narrator) "You would like Mr. Smith to call you regarding insurance prices for your car. Your number is 828-7828. Anything else, Mr. Johnson? (pause) Thank you. Good-bye." (secretary's voice)

7. Ann then fills in the date, time, and initials. (narrator)

8. Ann saves all the messages and gives them to Mr. Smith when he arrives. (narrator)

9. If Mr. Smith is out for the day, she leaves all messages on his desk in the order they were taken. (narrator)

10. Courtesy on the telephone is important to every business. How do you project a favorable impression? Here are a few hints: Most business offices answer the phone promptly – usually within two or three rings. They also identify themselves quickly. Sound familiar? (narrator) (Ring, ring) "Acme Construction, Mark Taylor." (male voice)

11. Sometimes, you can obtain information for the caller if they wish to wait. (narrator) "Will you hold or shall I call you back?" (Secretary's voice)

12. If the caller waits, depress the red "hold" button. (narrator)

13. When you return to the phone depress the blinking line button and thank the caller for waiting. Always thank the caller after the conversation. (narrator) "Thanks for waiting Ms. Jackson." (secretary's voice)

14. "If you're looking for information for longer than 30 seconds, give the caller a progress check." (narrator) "Ms. Jackson, I'm still looking. It will be a little while longer." (secretary's voice)

15. Always end the conversation promptly and tactfully, if the caller has no more questions. (narrator) "We're glad you called, Mrs. Baxter, goodbye." (secretary's voice) Then back to work. (narrator)

16. Lynda Payton receives many calls in her large office. Her phone contains 10 lines (narrator).

17. Bonnie, too, receives many calls. Her desk contains a switchboard that receives incoming calls, transfers inner-office calls and directs outgoing calls. (narrator)

18. Receptionists know that it is best to communicate cautiously when business and personal questions are asked over the phone. Mr. Lewis has just called to ask you if Mr. James is attending tonight's City Council Banquet. (narrator)

19. Be tactful and helpful, but don't give out confidential or business information. Ann responds like this. (narrator)

20. "I'm sorry. Mr. James is in conference until 2:00, may I have him call you back Mr. Lewis?" (secretary)

21. Another situation when you should be cautious is when "Chatty Cathy" calls to socialize. Be tactful and kind but after several minutes you might want to interrupt Cathy by saying... (narrator)

22. "Thanks for calling Cathy, but may I call you back at home tonight?" (secretary's voice)

23. If a caller asks for Mr. James, when he is in his office, be sure to ask the customer his or her name before connecting Mr. James to the caller. This allows Mr. James to prepare his thoughts before answering the call. (narrator)

24. There are many telephone styles but courtesy should be your number one goal. Remember, on the phone you are your company. (narrator)

25. Here are four suggestions for telephone courtesy: (narrator)

26. Number One: Speak Clearly and Distinctly into the receiver. (narrator)

27. Number Two: Be Friendly and Pleasant to all callers. (narrator)

28. Number Three: Be Enthusiastic and Alert to callers' questions and requests. (narrator)

29. Finally, talk naturally and sincerely – avoiding slang and technical terms. (narrator)

30. With these guidelines you should be able to answer the office telephone. (ring...ring) It's for you... (narrator)